MICHAEL J. HANLON, CFA

12 Michael Drive, York, ME 03909
(603) 501-9297, mhanlon162@gmail.com

Experience:

2016-Present University of New Hampshire — Durham, NH

Senior Lecturer in Finance & Co-Director, Peter T. Paul Financial Policy Center

Teach finance focused courses, with a specialization in investments, at both the graduate and undergraduate levels. Organize course materials, revising topics as warranted by changes in the global financial markets. Follow a participatory approach to teaching, aimed at engaging students in dialogue. Create a collaborative classroom environment, often utilizing team-based assignments (where appropriate). Maintain strong working knowledge of domestic and international capital markets as well as characteristics of the global economy. Act as a resource for students interested in pursuing careers in the fields of finance and investments. On a collaborative basis, help run the Financial Policy Center, including: Annual Finance Symposium. Created first of its kind Fintech class at UNH, focused on the intersection of finance and technology, including digital assets. Adjunct '07 - '16.

2008-2016 **Portfolio Manager** — Portsmouth, NH

R. M. Davis – Private Wealth Management

Managed over $100 million in discretionary investment portfolios, with stock selection decisions made by individual portfolio managers, in collaboration with the firm's research group. Solely responsible for client retention, communicating with clients via meetings, calls and emails, maintained extremely high client retention rate. Responsible for increasing assets under management, including leading the firm's efforts to open an office in Portsmouth, NH. Participated in investment research meetings, analyzing the firm's equity and fixed income universe, as well as, macroeconomic developments. Worked with clients and potential clients to help develop optimal asset allocation mixes for portfolios, including a focus on spending policies. Worked with tax and legal counsel on behalf of clients.

2006-2008 **Chief Investment Officer** — Portsmouth, NH

M&T Bank (then Ocean Bank)

Managed investment portfolios for institutional and individual clients. Member of Asset Allocation Committee, responsible for developing, monitoring and adjusting strategic and tactical asset allocation targets. Worked with clients to develop appropriate asset allocation based upon their unique needs, goals and objectives. Developed investment policy statements, detailing the investment strategy for each portfolio, with some clients requiring complex decision-making.

1996 – 2006 *Additional experience: Institutional Investment Advisor, Analyst and Wholesaler -* ***Fidelity Investments*** *(Boston, MA),* ***Altura International*** *(Monterey, CA) and* ***TD*** *(Portland, ME)*

Education:

2005 **University of New Hampshire** — Durham, NH
(M.B.A.) Masters in Business Administration

1997 **Bentley University** — Waltham, MA
(B.S.) Bachelor of Science in Finance

Professional Development & Community Involvement:

- CFA Charterholder
- Member - CFA Institute
- Leadership Seacoast Graduate
- Past Vice President - Maine CFA Society
- Investment Committee – York Hospital
- Member - CFA Society Boston
- Past Board of Trustees – Strawbery Banke Museum

Proficient with many Microsoft Office products and finance/investment software